

Maximizing Value with Automation and Digital Transformation

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A Realist's Guide

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Our research into service automation, intelligent automation, AI and digital transformation has involved thousands of survey respondents and case research interviewees. Our heartfelt thanks for sharing your knowledge, giving your time so generously and steering us towards an ever-deepening understanding of the technologies, how they are received in organisations and the challenges, risks and success factors. Without you, this research would not have been possible. For the present study, we thank the suppliers, major organisations and customers who generously gave of their time and brains in answering our questions and for providing such wonderful case details.

Introduction

Our general research into IT systems at Knowledge Capital Partners dates back over thirty years, while our focus on new technologies—Cloud, RPA, Intelligent Automation, AI and all of what we call the SMAC/BRAIDA digital technologies (see Chapter 1) date roughly from the emergence of cloud computing around 2010, through the introduction of Robotic Process Automation in 2012, and continuing developments in the major trending technologies, whose adoption will accelerate over the next 7–10 years. We think of these as comprising social media, mobile, analytics, cloud, blockchain, robotics, automation of knowledge work, internet of things, digital fabrication and augmented reality, with a watching brief on 5G, Web 3.0, quantum computing and metaverse. Not surprisingly, we see this as provisional and readily updateable. We research, understand and interpret them in the longer-term context of IT-based innovation and practice as applied to organisations everywhere but predominantly in businesses, non-profit organisations and government.

About the KCP Research Base

Knowledge Capital Partners is an expert research, advisory and communications firm providing independent, evidence-based insight into the impact of intelligent automation and digital technologies on industries, markets and organisations. It develops research-based planning, performance and measurement tools to guide successful technology deployment and navigate organisational challenges faced on the journey to digital transformation. It offers commissioned research services, thought leadership reports, strategy and operational advice and communications development for internal and market use.

We are writing, here, primarily for executives and practitioners and will endeavour to keep the academic apparatus and language to a minimum. Our apologies for when we fail. Nevertheless, readers will need some reassurance that the recommendations and action principles we arrive at are based on detailed, objective, rigorous, independent work. The KCP research base for this book draws upon 935 RPA, 160 Cognitive/AI and 86 detailed digital transformation adoption cases, growing to nearly 1200 cases by mid-2023. This has been supported by annual surveys on these topics across the 2015–2023 period. The cases and surveys cover client and vendor organisations from Europe, the USA, Canada, Australia, the UK, Asia Pacific, South America and Africa. As well as carrying out new research for this book over the 2022–2023 period, we also draw upon our prior publications. In particular, we would mention *Service Automation, Robots and The Future of Work* (2016), *Robotic Process Automation and Risk Mitigation: The*

Definitive Guide (2017), *Robotic Process Automation: The Next Phase* (2018) and *Becoming Strategic with Robotic Process Automation* (2020). There are also multiple work-in-progress papers available on our website, www.KnowledgeCapitalPartners.com. This includes research not published elsewhere and work prefiguring forthcoming books and publications. For those interested in our research methods, full details can be found in Willcocks, L., Lacity, M. and Gozman, D. (2021), 'Influencing Information Systems practice: The action principles approach applied to robotic process and cognitive automation,' *Journal Of Information Technology*, 36, 3.

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About the Authors

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Leslie is co-author of 73 books and has published over 230 refereed papers in journals such as *Harvard Business Review*, *Sloan Management Review*, *California Management Review*, *MIS Quarterly*, *MISQ Executive* and *Journal of Management Studies*. His work also appears in major media outlets such as *Forbes* magazine and *HBR* online. In 2023, he was in the world's top three most cited researchers in his field. Leslie has delivered company executive programmes worldwide, is a regular keynote speaker at international practitioner and academic conferences, and for 25 years, has been retained as an adviser and expert witness by major corporations and government institutions.

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